

MISSOURI DIVISION OF TOURISM

AUGUST MISSOURI TRAVEL BAROMETER
(DATA AVAILABLE AS OF 9/10/20)



Missouri Travel Barometer



The Missouri Division of Tourism research team analyzes a range of tourism research metrics in order to provide the Missouri travel industry and the MDT staff with a monthly *Missouri Travel Barometer*.

The barometer shows key travel indicators that illustrate various measurements affecting Missouri's tourism industry and are indicators of its health.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Lodging Trends – Week Ended August 29, 2020

OCCUPANCY
was down
33.3%
as compared to
the same week in
2019

**STATEWIDE
DEMAND**
DECREASED
32.8%

ADR
(Average Daily Room Rate)
DECREASED
18.3%

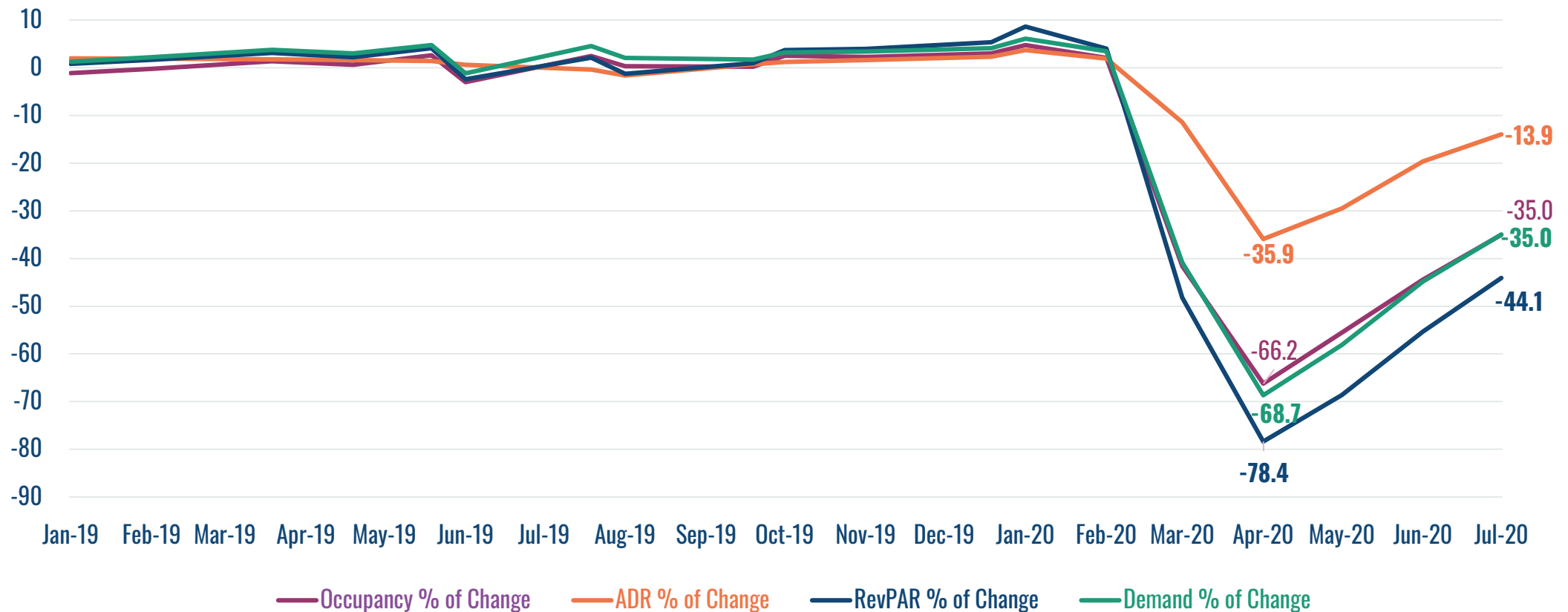
RevPAR
(Revenue per Available Room)
DECREASED
45.5%

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Monthly Lodging Trends Percentage of Change

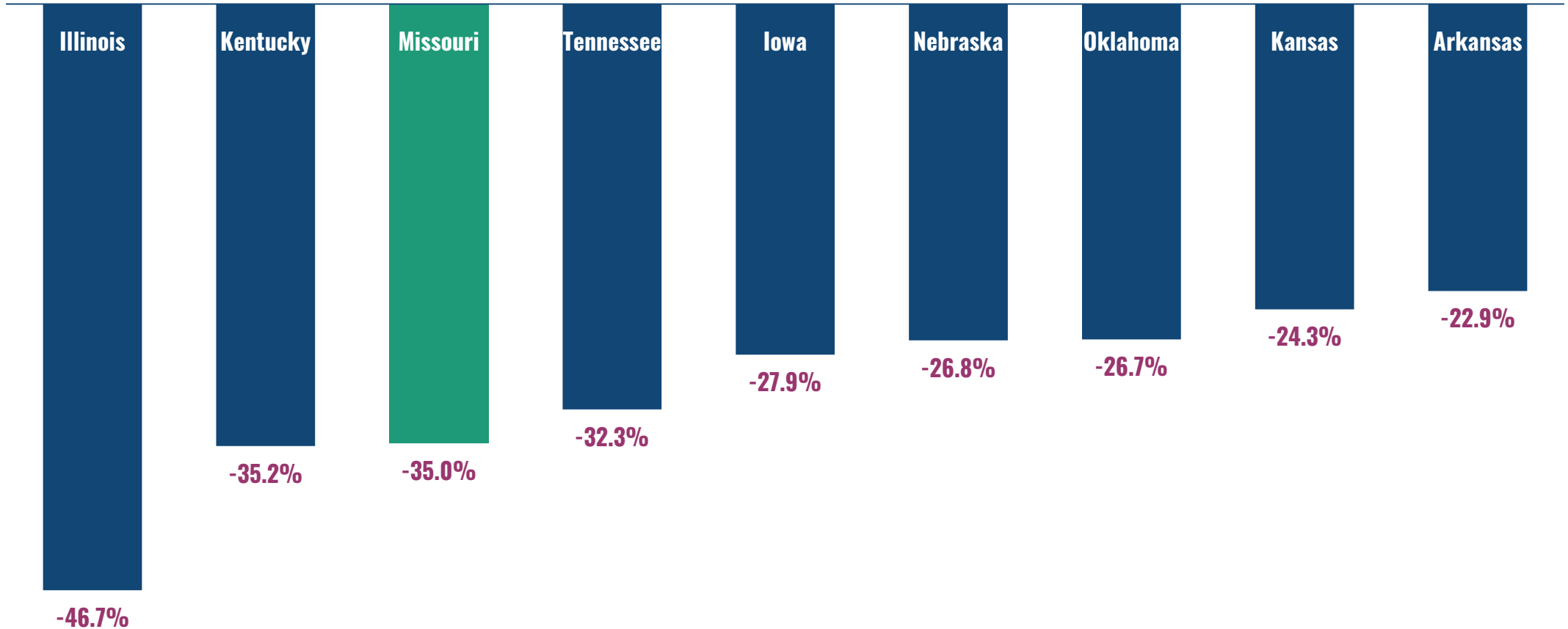


Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR July 2020 Occupancy Percentage of Change from July 2019 Comparison of Neighboring States

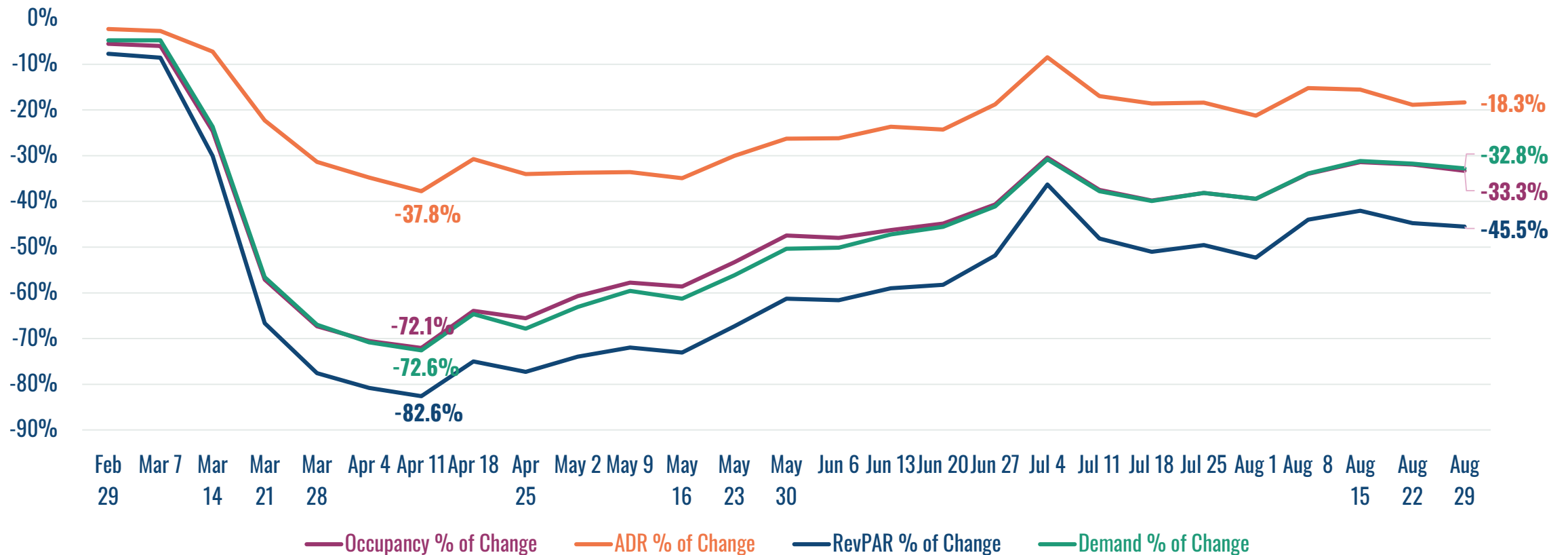


Missouri Travel Barometer



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STR Weekly Lodging Trends Percentage of Change

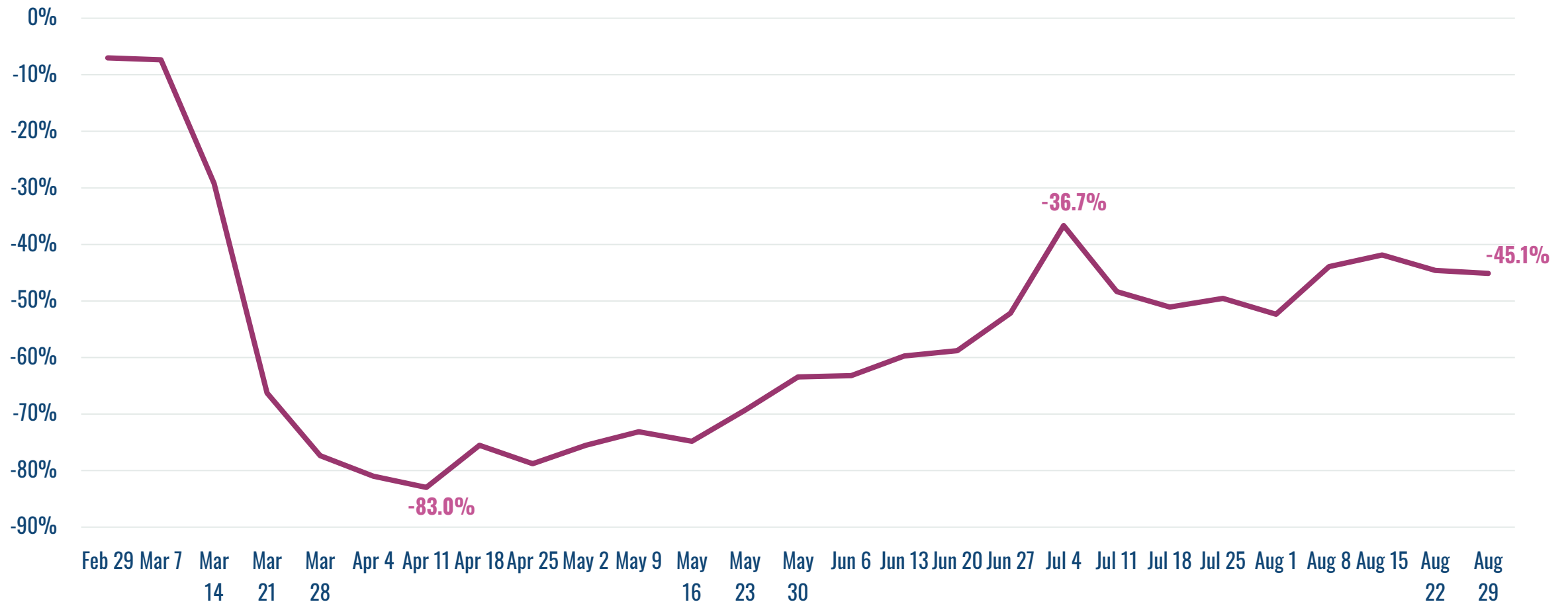


Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Weekly Missouri Lodging Revenue % of Change from Prior Year



Missouri Travel Barometer



The effect of Covid-19 first hit the week ending 2/29

AirDNA Short-Term Rental Trends for Hotel Comparable Rooms

January – July 2020 Compared to 2019

OCCUPANCY
was down
-0.4%
as compared to
the time period in
2019

**STATEWIDE
DEMAND**
INCREASED
21.0%

ADR
(Average Daily Room Rate)
INCREASED
7.0%

RevPAR
(Revenue per Available Room)
INCREASED
7.0%

AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rental Trends for Entire Place Rentals

January – July 2020 Compared to 2019

OCCUPANCY
was down
-0.4%
as compared to
the time period in
2019

**STATEWIDE
DEMAND**
INCREASED
18.0%

ADR
(Average Daily Room Rate)
INCREASED
3.8%

RevPAR
(Revenue per Available Room)
INCREASED
4.7%

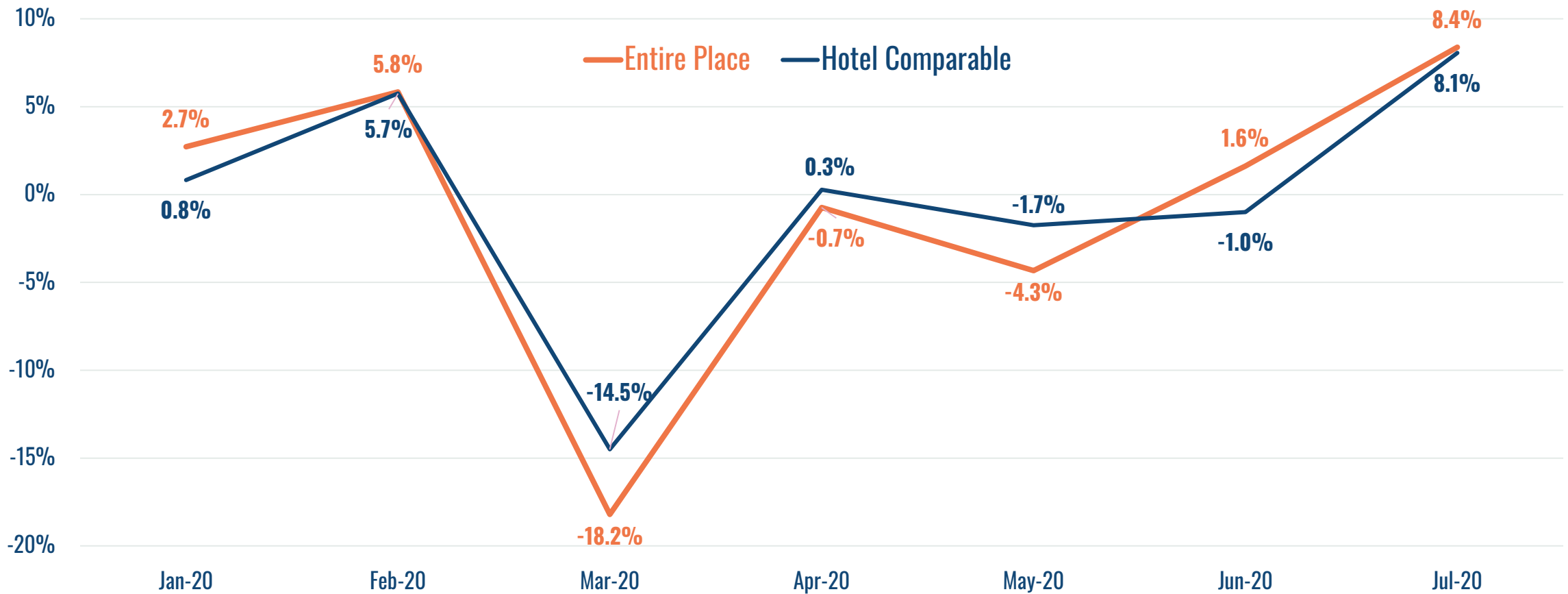
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

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AirDNA Short-Term Rentals Occupancy% of Change from Prior Year



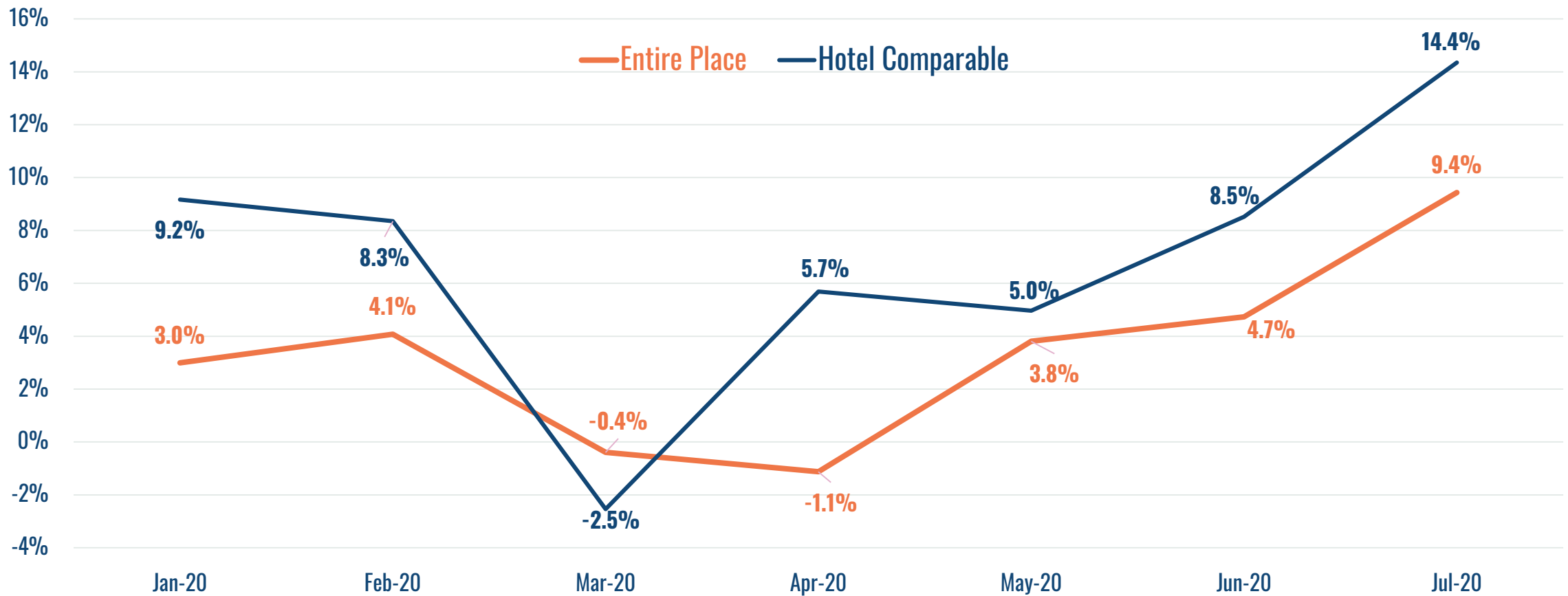
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Missouri Travel Barometer

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AirDNA Short-Term Rentals ADR % of Change from Prior Year



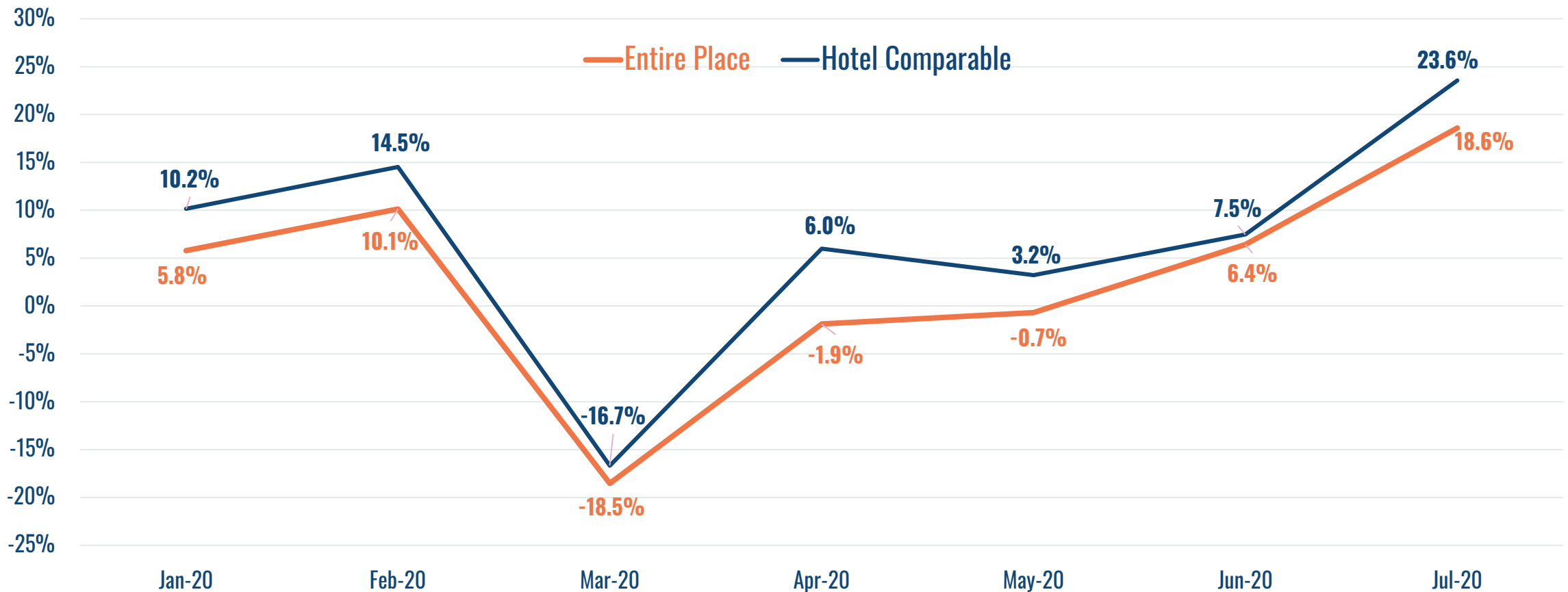
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

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AirDNA Short-Term Rentals RevPAR % of Change from Prior Year



AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



NAICS Tourism Business Sales through June 2020

**June
2020 saw a**
-23.5%
(**\$324.4 million**)
DECREASE
**in tourism-related sales
revenue compared to June
2019**

**For FYTD20,
preliminary reports
for Jul-Jun indicate a**
-10.7%
(**\$1.5 billion**)
DECREASE
**in tourism-related
sales revenue**

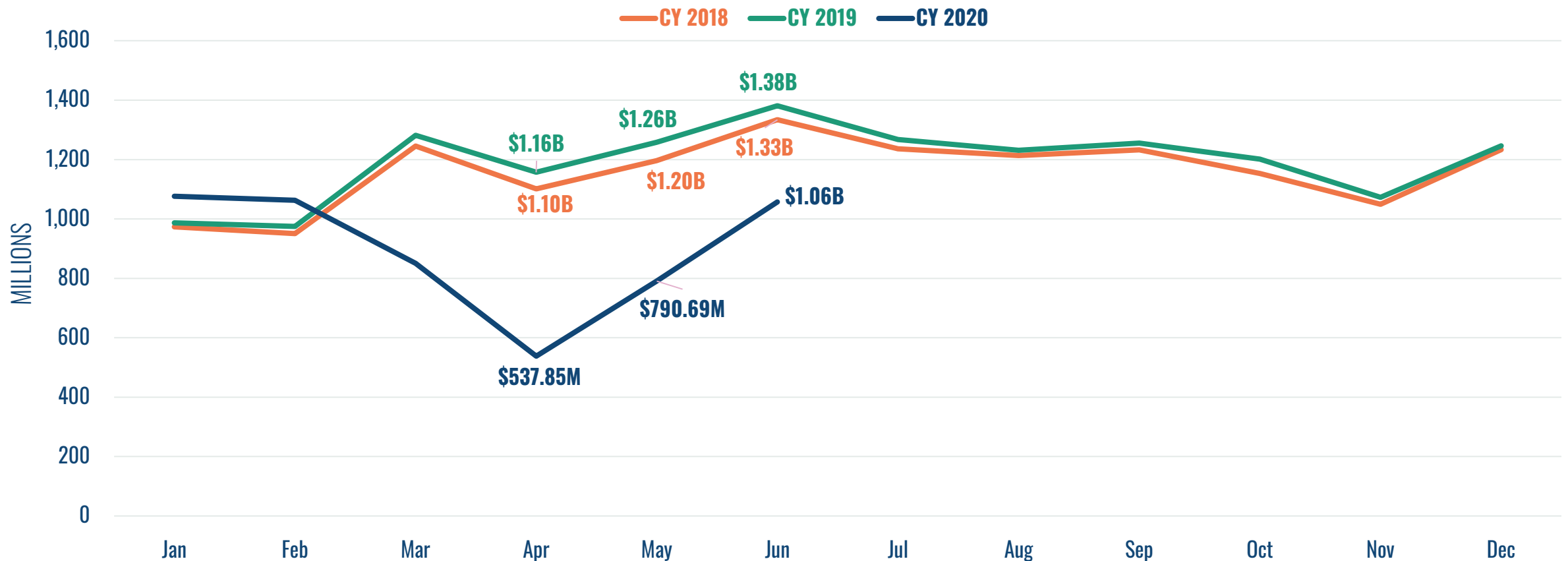
**For CYTD20,
preliminary reports
for Jan-Jun show a**
-23.6%
(**\$1.7 billion**)
DECREASE
**in tourism-related
sales revenue**

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



CY Sales Revenue from Tourism-Related NAICS



Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



CYTD January - June Sales Revenue from Tourism-Related NAICS

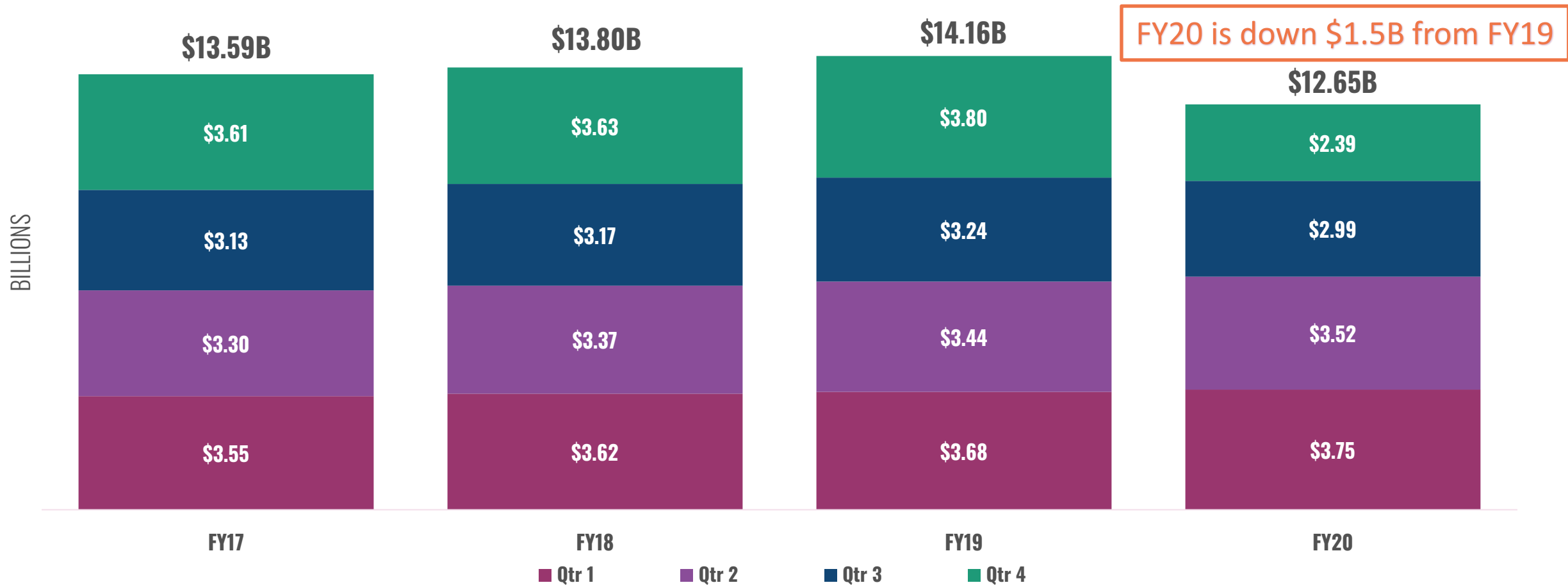


Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



FY Sales Revenue from Tourism-Related NAICS



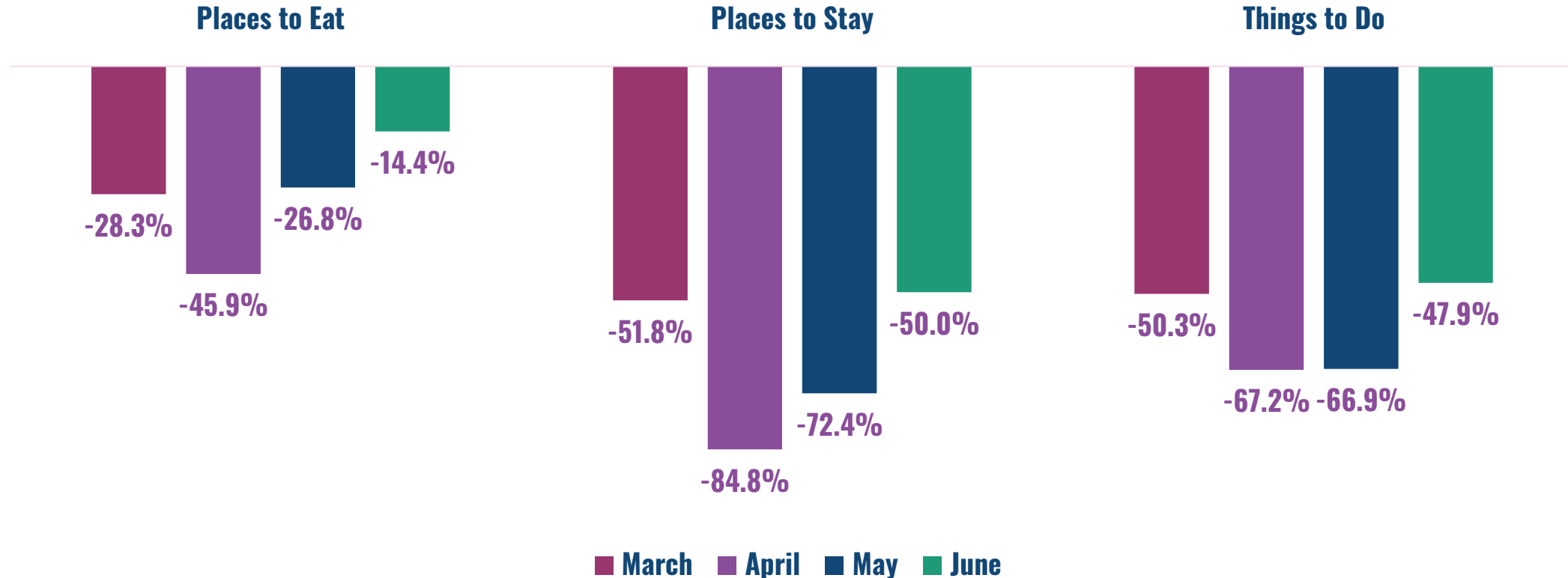
Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



NAICS Tourism Business Sales

Change in March - June 2020 Compared to March - June 2019

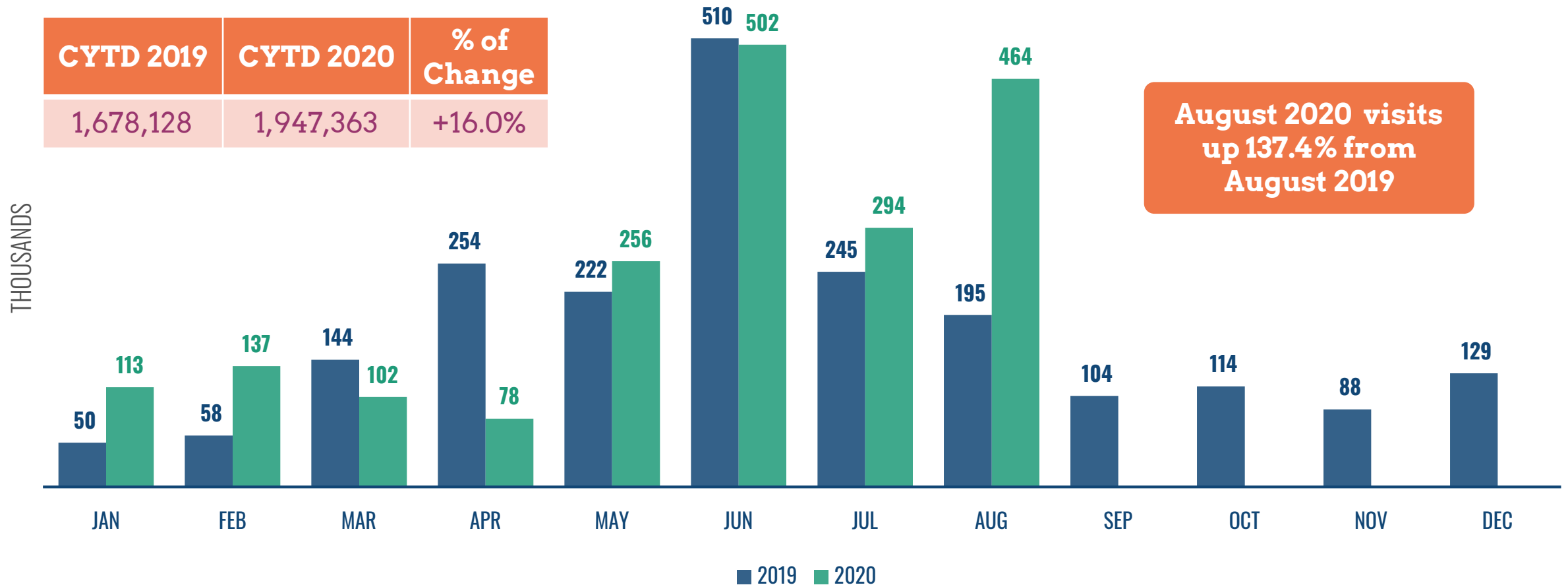


Missouri Travel Barometer



No significant marketing to drive website traffic or to solicit responses in the early part of 2020

Calendar Year Visits to VisitMO.com by Month



May 2018 was the first full month of the new VisitMO website. Covid-19 began early 2020.

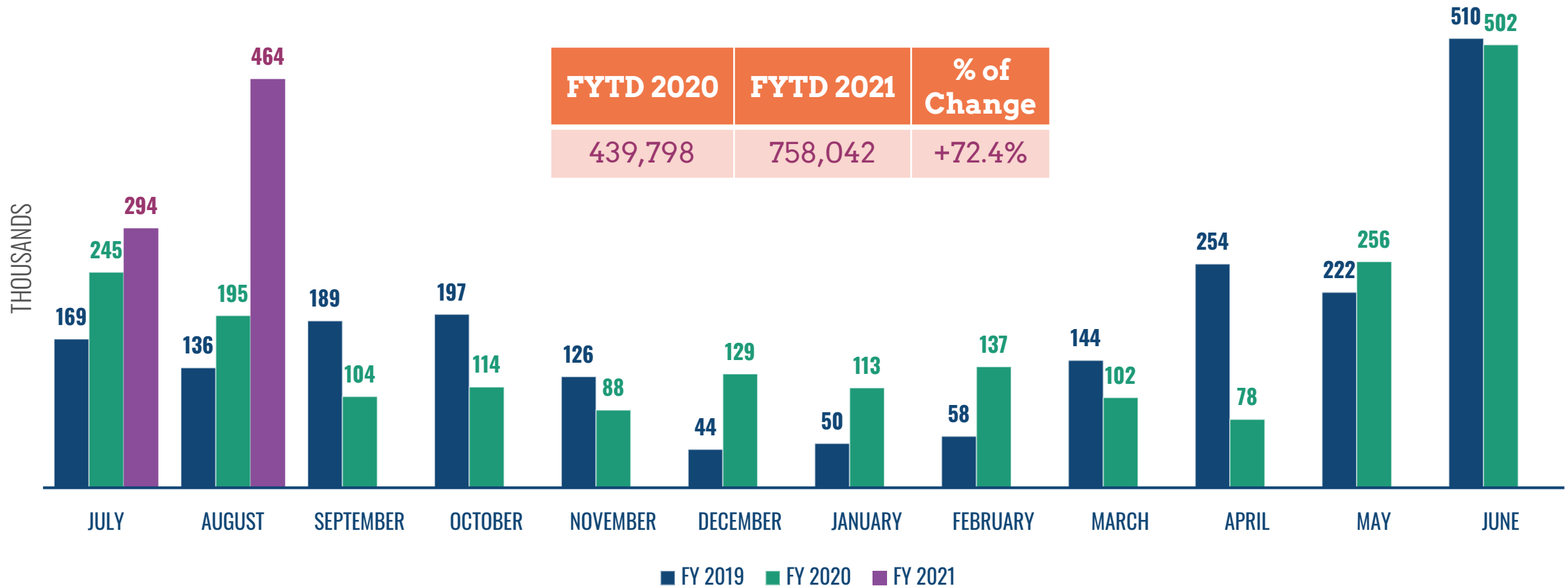
Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns.

Missouri Travel Barometer



No significant marketing to drive website traffic or to solicit responses in the early part of 2020

Fiscal Year Visits to VisitMO.com by Month



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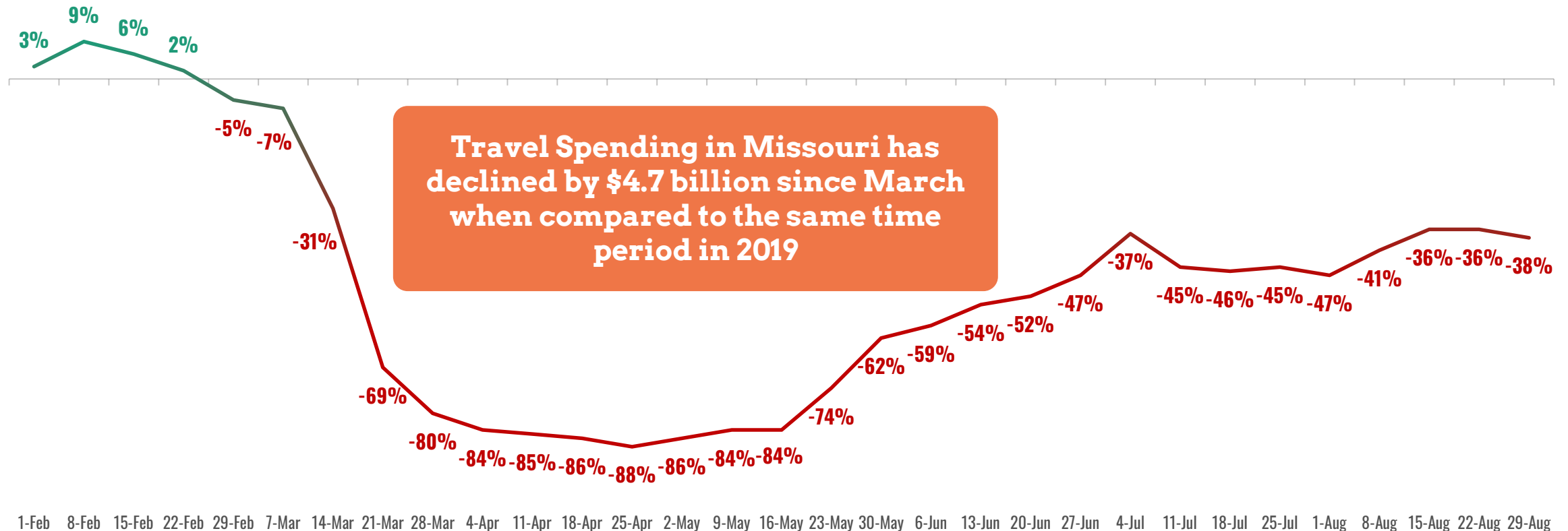
Missouri Travel Barometer

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Economic Impact

Year-Over-Year % Change in Weekly Travel Spending in Missouri

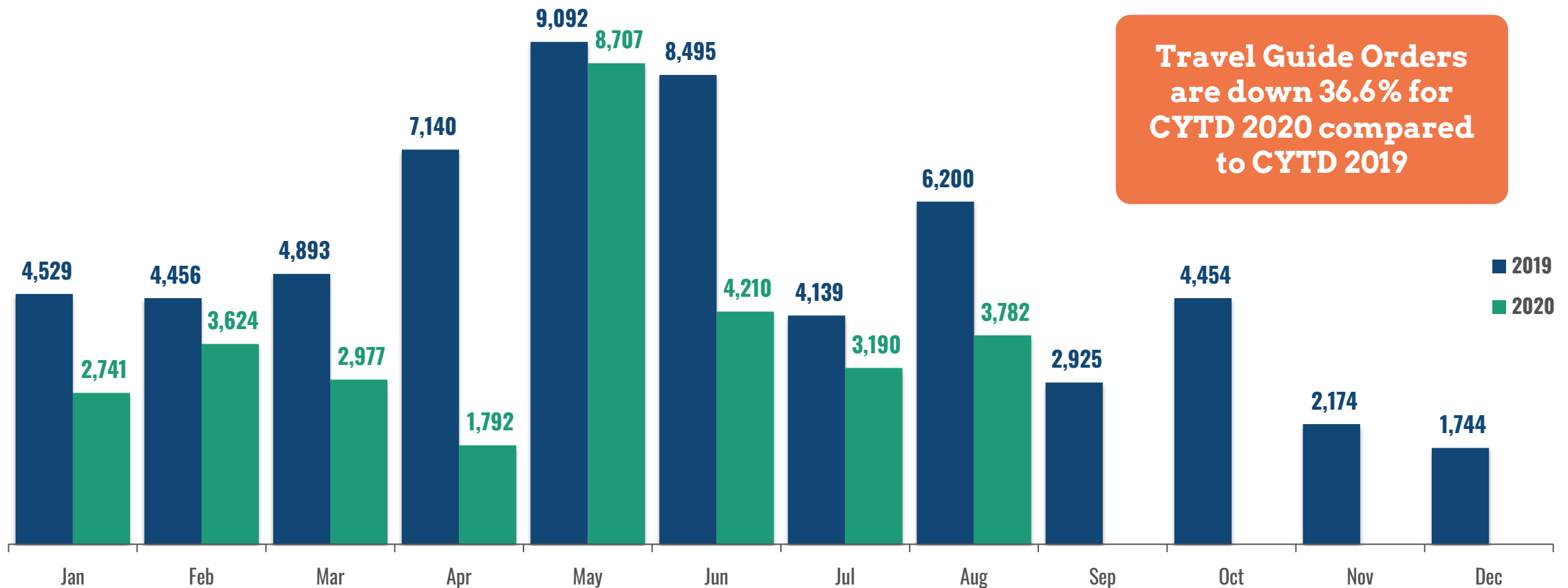


Missouri Travel Barometer



No significant marketing to drive website traffic or to solicit travel guide orders in the early part of 2020

Fulfillment of Travel Guide Orders from All Sources



Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns. Travel guide orders come through website orders, RSL leads and telephone calls.

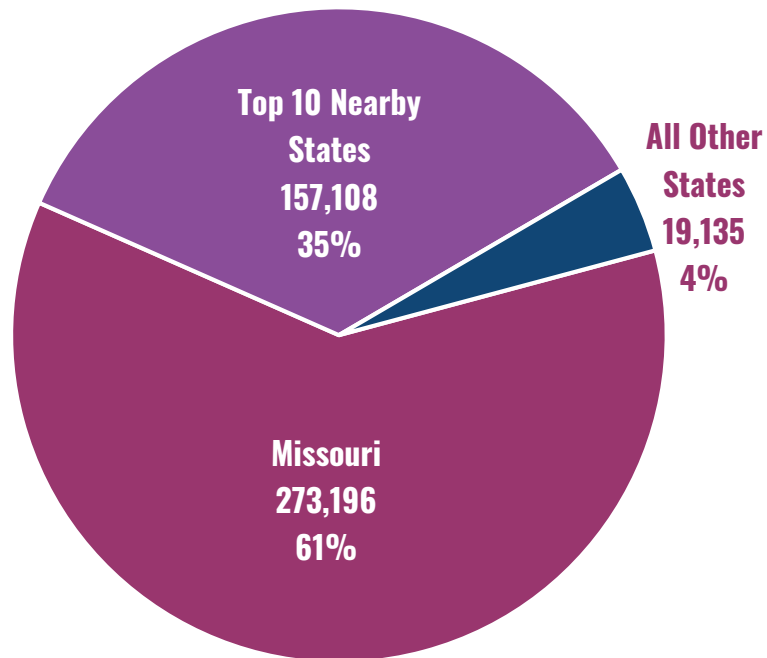
Missouri Travel Barometer



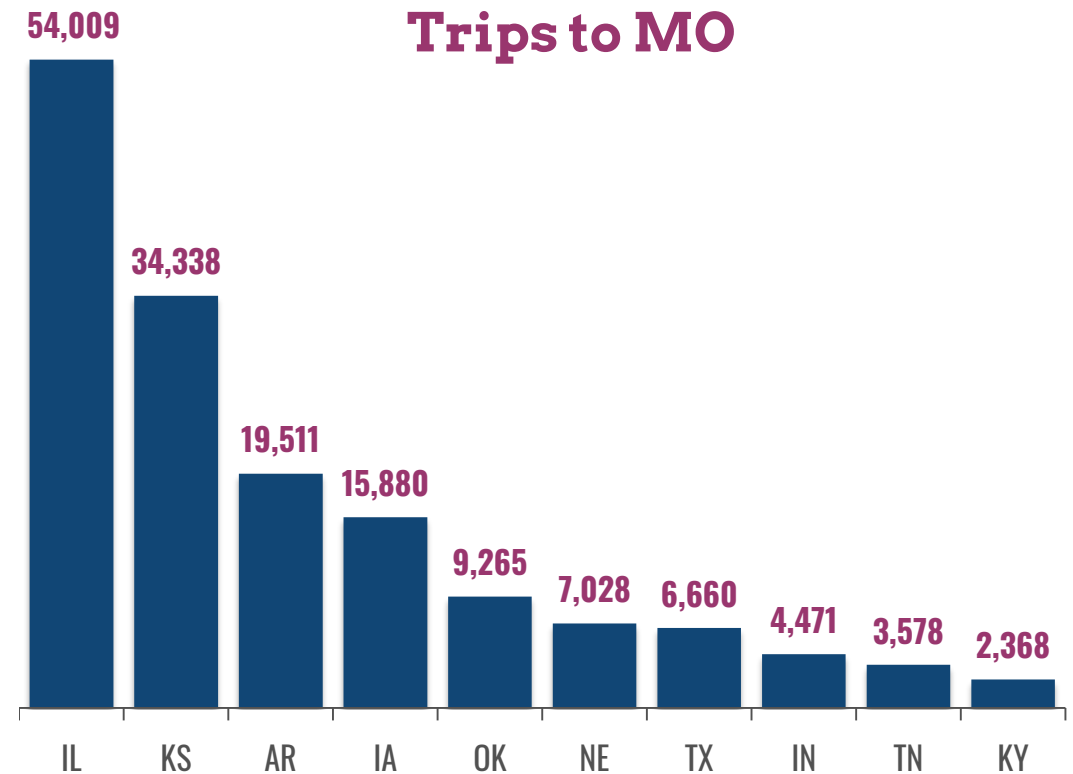
Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

January – August Road Trips to Missouri as Reported by Arrivalist

Regional Share of Road Trips to MO



Top Nearby States for Road Trips to MO



Missouri Travel Barometer

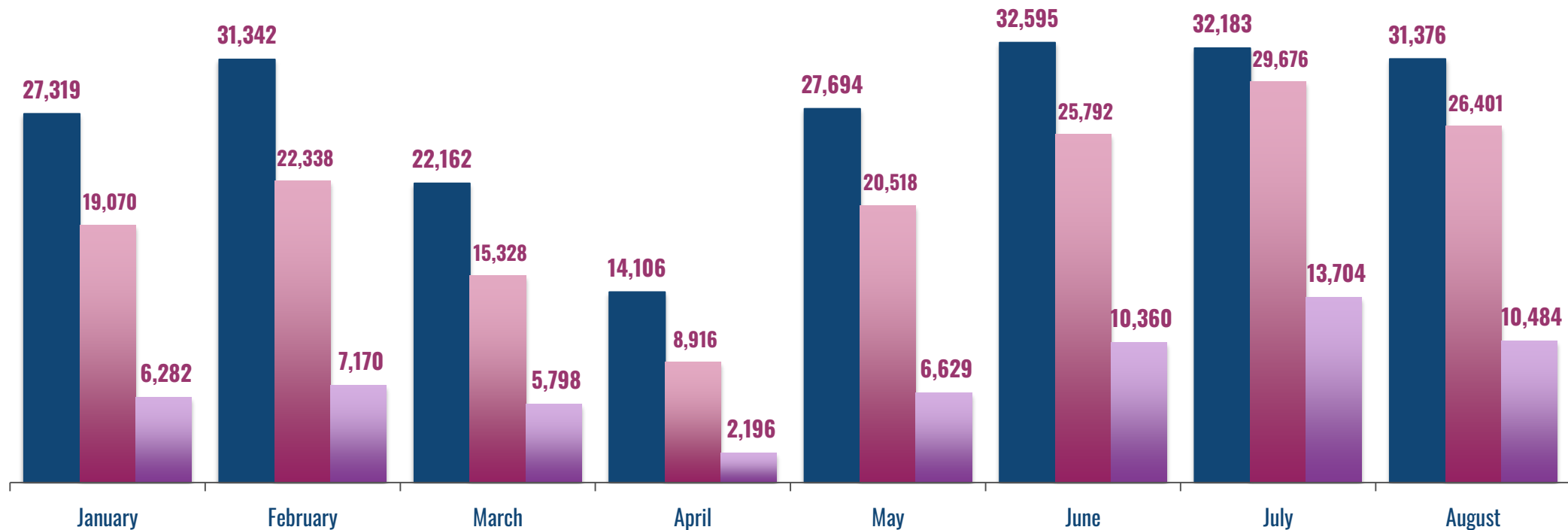


Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

Road Trips to Missouri as Reported by Arrivalist

Road Trips by All States to MO by Month & Distance Driven

■ 50-100 miles ■ 100 - 250 miles ■ 250+ miles

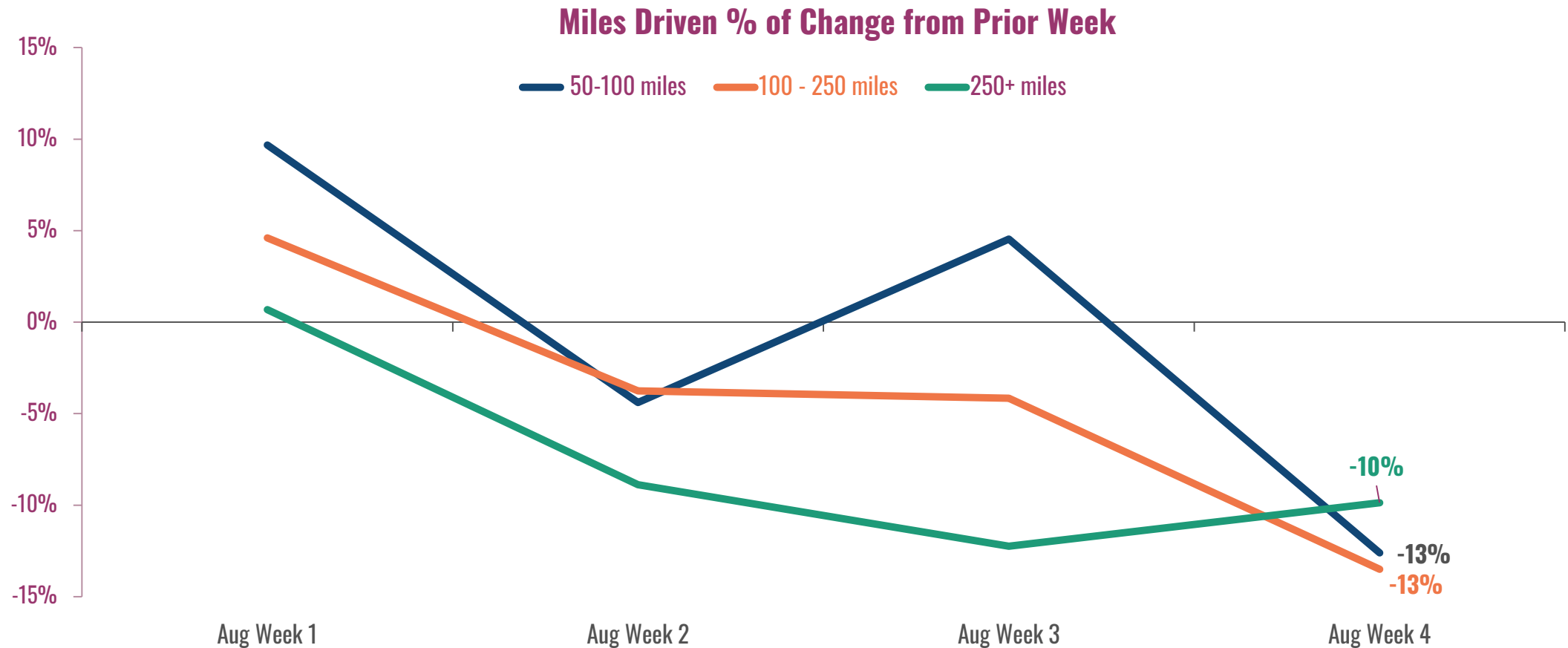


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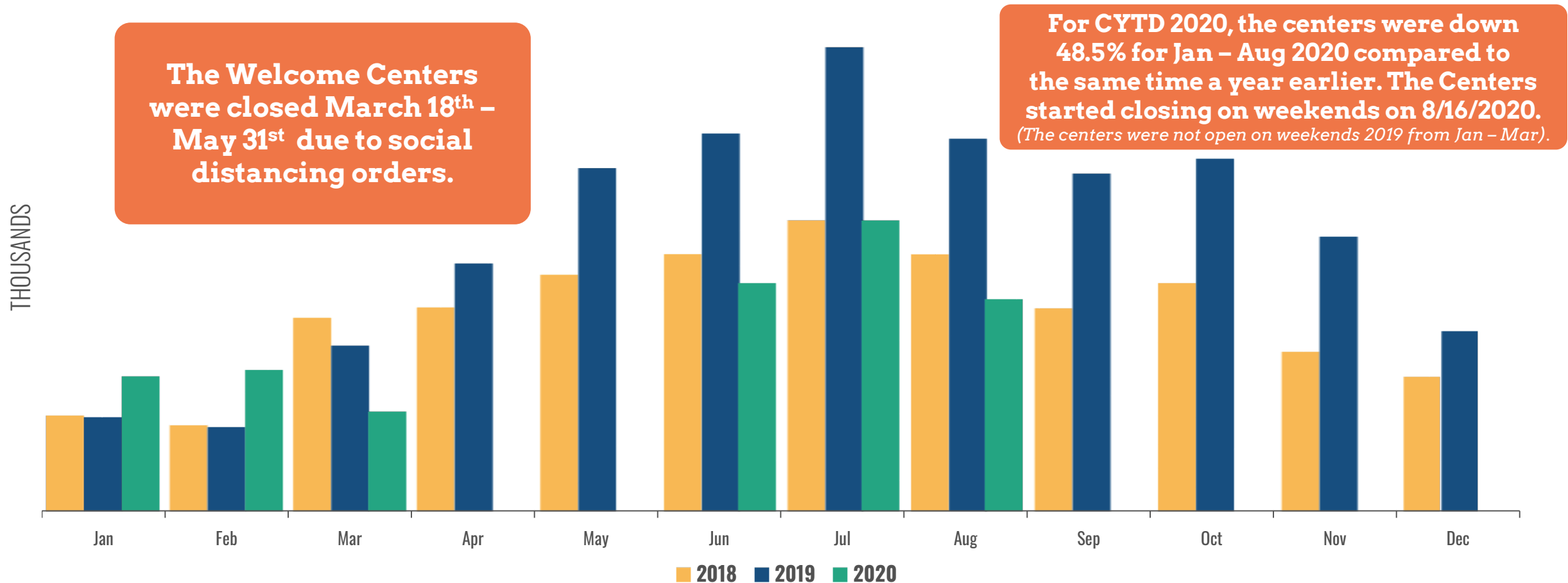
Road Trips to Missouri as Reported by Arrivalist



Missouri Travel Barometer



Welcome Center Visits: 2020 Calendar Year to Date through August



THANK YOU

